



**Naples Asset Management Company®, LLC**

## **PRIVACY POLICY 2012**

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Providers of personal financial and tax services are required by law to inform their clients of their policies regarding privacy of client information. This notice is being provided to you to specify the privacy policies and procedures that we have implemented to safeguard your nonpublic personal information.

### **INFORMATION WE COLLECT**

The firm will collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. Nonpublic personal information means personally identifiable information and any list, describing or other grouping of consumers that is derived using any personally identifiable financial information that is not publicly available.

### **INFORMATION WE DISCLOSE**

The firm does not disclose any nonpublic personal information obtained in the course of our practice about our clients or former clients to anyone, except as required or permitted by law, or unless specifically requested by you. Permitted disclosures include, for instance, providing information to members of the firm, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all situations, we stress the confidential nature of the information being shared.

### **CONFIDENTIALITY AND SECURITY**

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs, and in some cases, to comply with professional guidelines. In order to protect your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with professional standards.

If you have any questions, because of privacy, our professional ethics, and the ability to provide you with quality financial services please call us at (239) 593-5525 or by email [pmcintyre@NaplesAM.com](mailto:pmcintyre@NaplesAM.com).